

The background of the cover is a photograph of a beach scene. The top half shows a clear blue sky with a soft, warm light source in the upper right corner, creating a gradient from blue to a light orange/yellow. The bottom half shows the ocean with white-capped waves breaking onto a sandy beach. The overall color palette is dominated by blues and a hint of warm orange at the top right.

State of California

1994/1995 Marketing Plan

California Division of Tourism
(California Tourism)

California Technology, Trade & Commerce Agency
Lon S. Hatamiya, Secretary

March 1, 1994

TABLE OF CONTENTS

I.	Situation Analysis	Page 3-4
II.	Marketing Strategies	Pages 4-7
III.	Economic Development	Pages 7-8
IV.	Issues Management	Pages 8-9
V.	Crisis Response	Page 9
VI.	Research	Pages 9-12
VII.	Collateral and Fulfillment	Pages 13-18
VIII.	In-State Marketing	Pages 19-24
IX	Domestic Marketing	Pages 25-32
X.	International Marketing	Pages 33-43
XI.	FY 1994/95 Proposed Marketing Budget	Page 44
	Glossary of Terms and Acronyms	Pages 45-48

SITUATION ANALYSIS

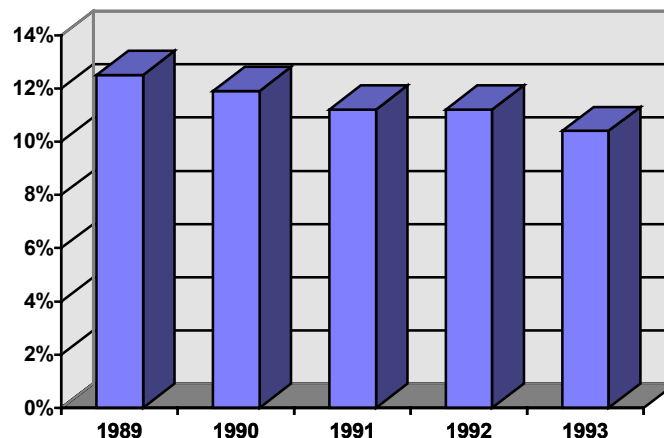
Tourism is arguably California's leading industry when measured in terms of combined consumer spending, employment and tax revenue. In 1993, the latest year measured, it contributed \$53.6 billion in expenditures to the state's economy, generated \$2 billion in state taxes, \$1 billion in local taxes and employed 681,000 Californians, second only in employment to health care.¹ Travel and tourism-related jobs account for approximately 6.5 percent of the Gross State Product.

California is the number one travel destination in the U.S., both in domestic and international tourism. Travel spending here is half again larger than in Florida, four times more than in Nevada, and seven times bigger than in Hawaii.² In fact, there are more hotel rooms in Los Angeles County alone than in the entire state of Hawaii.

268 million person trip visits were taken within California in 1993, down 4.5%. California residents take 82% of all leisure trips in the state. However, much more lucrative to the state, because they spend more for hotels, meals, transportation and activities, are out-of-state visitors. 37 million Americans (14%) and 10 million international visitors (4%) traveled in California last year.³

Of concern is that growth of tourism within California has slowed considerably, and California's position as the number one destination in the U.S. has been eroding. As shown in the following table, in 1989 12.5 percent of all Americans traveled to and within California. Today, only 10.4 percent visit our state, a loss of 16.8%.

California's Share of U.S. Domestic Leisure Travel



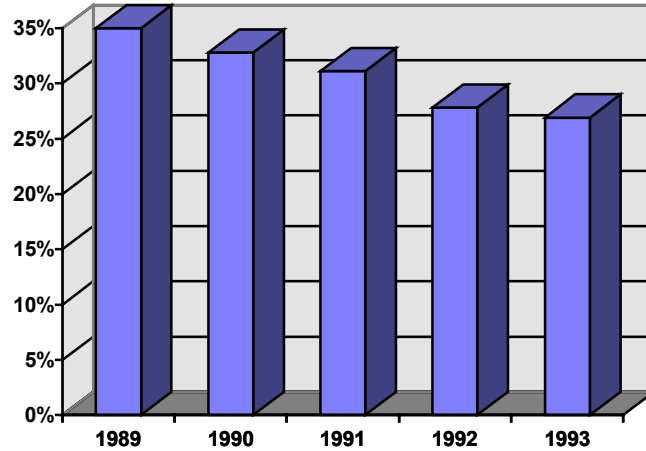
This loss in market share equated to an annual loss of \$2.75 billion in travel spending, \$104 million in state taxes, \$50 million in local taxes collected and 34,000 fewer jobs, just because California did not protect and sustain its 1989 share of domestic leisure travel.

¹California Travel: Its Economic Impact, California Division of Tourism, March 1994.

²US. Travel Data Center, 1994

³Domestic Travel to California. D.K. Shifflet & Associates, 1994; Overseas Visitors to California. CIC Research, Inc., 1994; U.S. Travel and Tourism Administration.

California's Share of U.S. International Leisure Travel



The problem isn't just a domestic one. California has lost share of international leisure travelers every year since 1989. In 1993, California lost German, Italian, British, Spanish and Hong Kong visitors to other states. The only bright spots last year were in the Pacific where California's share of travelers to the U.S. from Taiwan, Japan, Korea and Philippines grew.

Four principle causes have triggered this decline:

1. Increased competition from other states
2. Insufficient marketing funds to keep California top-of-mind among consumers and the travel trade
3. The effect of highly publicized crimes and disasters on California's attractiveness as a travel destination, and
4. California's inability to keep itself trendy in the minds of travelers.

MARKETING STRATEGIES

The California Division of Tourism (CalTour) marketing plan is divided into three major marketing programs: in-state, domestic and international marketing. Within each of these programs are major elements that can cross over to other programs. That is, the Ski California element (which began as an In-state marketing program) now applies to all three programs: in-state, domestic and international.

These programs utilize a variety of marketing tactics, such as: research, advertising, publicity, promotions, direct marketing, sales missions, trade shows, collateral, fulfillment and special events. These tactics often apply to one or more programs.

The California Tourism Policy Act of 1984 specifies that the California Tourism Commission (CTC), in cooperation with CalTour and the Trade and Commerce Agency, adopt and annually update this plan.

The plan, to the extent practical and feasible, is intended to:

1. Serve as a guide for effectuating the California Tourism Policy Act with available recourses,
2. Include an assessment of the activities and accomplishments of CalTour (in annual report),
3. Outline the intended program of tourism promotion and visitor service activities for the upcoming year,

4. Delineate the ways, means and programs by which tourism shall be promoted, including any cost-effective marketing methods and techniques to be employed,
5. Identify resources as are reasonably necessary from all sources both public and private, to accomplish these promotion and marketing activities,
6. Identify and articulate cooperative or shared cost programs, or opportunities for these ventures, with private entities,
7. Identify licensing opportunities, including licensing agents, and
8. Contain other information, data or recommendations that may be germane to the marketing efforts of California pursuant to the intent of the Policy Act.

Public-private cooperative efforts in trade development, advertising, promotions, regional marketing and other aspects of the plan have been included, where practical, in order to extend the purchasing power of CalTour's budget.

The fundamental objective of this plan is to promote travel to and within the State of California.

The following marketing strategies support that objective. The CTC has decided (supported by general consensus within California's travel industry) that CalTour's responsibility should be to conduct tourism marketing that individual businesses and destinations within the state could not do, as effectively, on their own. Generally, this involves promoting the concept of California as a single travel concept, although to do this CalTour utilizes specific "travel typologies" (family travel, romantic getaways, recreation and sports, nature, and Multicultural experiences) or the diversity within California's tourism regions to promote travel within the State.

When marketing within California, the CTC has established the general strategy of promoting travel to California's lesser-known and under-utilized destinations. When marketing outside California, the CTC has directed CalTour to promote travel to all California destinations.

The CTC has directed that international and domestic markets for California be developed, with emphasis on markets which bring new tourists and, thus, new revenue into the State. The State of California serves a critical role in the industry's ability to tap these lucrative and growing markets, in that it often opens relations and lines of business with these new markets or provides a broader dimension to the industry's own marketing activities. This can give California travel businesses a competitive advantage to travel businesses in other states and destinations.

CalTour also serves as a catalyst to bring together the State's competing businesses and destinations to work together for the greater purpose of attracting visitors. At times, CalTour's investment on a given program element is minuscule compared to the industry's. On the Ski California element, for example, CalTour provides \$180,000 in funding and the industry contributes \$500,000. Yet, the industry would never have raised the \$500,000 had it not been for the leadership, vision, equity and financial contribution of the State. Similarly, the \$10,000 per rural region provided as seed money for regional marketing, as stimulated additional investment by communities and businesses throughout these regions. Without CalTour's involvement, the regions would quickly bifurcate into competing marketing groups, resulting in confusing messages to travelers and lowering visitation to California.

California tourism icons, such as the Golden Gate Bridge, Disneyland, Half Dome, and The Hollywood Sign⁴, among others, are extremely valuable in stimulating recognition and purchase of California vacations, so they are used more often than other California symbols in attracting visitation.

⁴ "The Hollywood Sign" is a registered trademark of the Hollywood Chamber of Commerce and is used with permission whenever seen in CalTour communications and marketing.

Just because a destination is successful or highly recognized does not eliminate it from being promoted within the State's marketing program. In fact, just the opposite may be needed in order to effectively sell travel to California. Likewise, just because a destination is little-known or unrecognized does not eliminate it from being promoted within the State's marketing program, either. New destinations may be just as useful in stimulating travel to California.

CalTour is open to criticism whenever it singles out a particular destination or business for attention, but to be effective, this is often required. It is impossible for CalTour to identify every place or business in CalTour marketing activities. California is just too big. However, CalTour attempts to be fair and balanced in its representation of all regions, destinations and attractions within California, but it is not always possible or productive to identify every city, region or attraction within the state. At times, it may be counterproductive to do so. The objective of this program is to effectively market travel to and within California. To best accomplish this, decisions on what to identify or what works best for the given market is left to the professional judgment of CalTour with review and approval by the CTC.

FY 1994/95 overall goals and objectives include:

- To stimulate positive, top-of-mind awareness of California as a "premiere" travel and vacation destination among key targeted geographic, demographic and sociographic markets, in targeted areas of the United States, Canada, Mexico and overseas.
- When marketing to audiences within California, CalTour focuses upon adults, aged 25-plus, with household income exceeding \$35,000; when marketing outside California, CalTour focuses upon adults aged 35-plus, with household incomes of \$50,000.
- To encourage, persuade and motivate these "target markets" to select California as their travel and/or vacation destination.
- To serve as a catalyst in developing strong public/private partnerships to promote tourism to the State, via the execution of marketing programs designed to achieve the mutually beneficial objectives of all participants - public and private.
- To maximize the addition of the private sector investment. This is a valuable effort which gives the State maximum impact for dollars invested.
- To serve as a catalyst in securing California tourism industry involvement in selected domestic and foreign travel trade shows. Many regions, smaller chambers and convention bureaus and attractions can now market to an international audience because of this State effort, making trade show attendance economically feasible.
- To communicate with California's tourism industry, the media (domestic and international), and the travel trade. This facilitates effective planning and participation on the part of the private sector.
- To measure and assess marketing effectiveness and impact. The State does not have a "main gate" or "ticket counter" at which to measure sales, so other methods, such as visitor characteristic studies, visitor impact studies, pre/post research focus groups and coupon redemption is used to assess effectiveness.

- To stimulate travel to lesser-known and underutilized destinations and work with these destinations in the development of regional tourism marketing programs.
- To serve as a marketing umbrella for California as a year-round vacation destination. The State's role is to promote travel to and within California. In accomplishing this, CalTour does not replace the private sector's efforts in marketing individual destinations and businesses within the State, but complements these marketing efforts.
- To generate private-sector support to assist the State in communicating California's unique offerings and attractions.
- To educate and motivate the travel trade via sales missions, familiarization tours (fam tours), educational seminars and sales calls promoting California in targeted markets.

ECONOMIC DEVELOPMENT

CalTour is mandated within Section 15364.51 of the Government Code to "encourage investment in new tourism facilities and renovation of older facilities." In light of that mandate, CalTour works with other divisions within the California Trade and Commerce Agency (TCA) to encourage tourism expansion and retention. Following are projects supported during 1994/95:

United States Golf Association Museum and Library, Monterey

CalTour is assisting the U.S. Golf Association with liaison with State agencies related to consideration of location its national museum and library in Monterey. This has involved providing information about tourism within the State and particularly the Monterey Bay area. CalTour has also worked with the California Department of Parks and Recreation and California Coastal Commission regarding this economic development project. California is in competition with New Jersey, Rhode Island and Georgia for the museum.

Westcot, Anaheim

The Walt Disney Company remains undecided about building a new resort hotel and theme parks complex near Disneyland. The new complex (called Westcot) would contain a standing world's fair, similar to Epcot in Florida, a third theme park and resort hotel properties. \$90 million in new state tax revenues would be generated from increased tourism. In addition, the expansion is anticipated to generate \$2.4 billion annually in additional economic activity in the five-county Southern California region. CalTour has participated in planning sessions and TCA Red Teams.

Gold Rush City, Lathrop

CalTour continues to meet with developers and has provided comment on the draft specific plan and E.I.R. This project is a \$4 billion development to employ 28,000, involving sites for two major theme parks and other amusement attractions and marinas, golf courses, hotels, shops, restaurants, sporting and office complexes and housing developments on the delta, south of Stockton.

Native American Indian Cultural Center, Tustin

CalTour is assisting the Juaneno Band of Mission Indians with concepts related to placing a living history theme park of American Indian villages and a university for native-Americans somewhere in Orange County, perhaps at the El Toro or Tustin Marine bases. CalTour has urged the developers to seek support of the Orange County Board of Supervisors.

Treasure Island, San Francisco

CalTour met with a group that proposes reuse of the U.S. Naval Station Treasure Island as a standing World's Fair.

Entertainment USA, Temecula

CalTour assisted the project with letters of support and analysis of its financial feasibility study. The project undergoes approval by Temecula voters in Spring.

Legoland, Carlsbad

CalTour continues to assist Lego World A/S in the development and placement of a children's theme park in Carlsbad. Since last year's announcement that California was selected for the Danish company's first park outside Europe, CalTour has promoted the future park in its promotional materials and participates as part of the development team.

Leimert Park, Los Angeles (Crenshaw District)

CalTour continues to provide guidance and assistance toward developing an African-American cultural tourist district in South Los Angeles with the Crossroads Arts Academy and Vision Complex serving as key ingredients to the development of the district. CalTour introduced Leimert Park business leaders with well-known state tourism executives for the purpose of encouraging partnerships and guidance.

ISSUES MANAGEMENT

The California Division of Tourism often serves as an intermediary between the travel industry, Wilson Administration, State legislature, federal agencies, and local organizations on a variety of tourism issues. Anticipated issues in the coming year, include:

- Senate Bill 1479 - California Tourism Marketing Act
- White House Conference on Travel and Tourism
- California Welcome Centers
- Tourist Oriented Directional Signs
- Travel Agent Regulation
- Ticket Agent Regulation
- Cruise Ship Gaming
- Passenger Services Act of 1886
- Currency Exchange
- Governor's Workshop on Tourism Safety
- US/Japan Tourism Exchange
- World Conference of Tourism Ministers
- White House Conference on Travel and Tourism
- California Conference on Tourism
- California Tourism Awards

CRISIS RESPONSE

If there has been one constant in the past four years, it has been crisis response. CalTour has become so schooled at crisis response, that the Director and Media Relations Manager keep copies of the Division Crisis Communications plan on hand 24-hours a day to be exercised in the event of another crisis. This involves gathering facts and disseminating factual information to consumers and the travel trade to suppress rumor and unfounded fears, to sustain tourism where travelers are not threatened and to recover tourism quickly in areas where disaster has occurred. Also, CalTour has served as advisor to affected areas providing guidance that can be useful in recovering quickly and to seek external assistance in the form of grants or action.

RESEARCH

Research is an integral part of any marketing program. Because the California Division of Tourism must be held accountable for the expenditure of public dollars, research undertaken by CalTour has even greater relevance to program activities.

Through its research program, CalTour develops and disseminates quantitative data and analyses demonstrating the impact of tourism in California, identifying markets and trends, and validates the effectiveness of State tourism marketing programs.

Additionally, CalTour provides research assistance and statistics to California companies and destinations, as well as program support to other Divisions programs in presenting findings to the State Legislature, travel industry and agencies of state and local government. Division staff consults frequently with academicians and specialists nationwide on ways to improve research methodology, data reliability, and to identify opportunities for cooperative projects.

Economic Impact Analysis

The Division is mandated to document the relative growth or decline of travel spending, employment, payroll, and state and local tax revenues. CalTour is the only publicly available source of this type of data on a statewide basis. The Division also compiles data on tourism-related impacts at the county level.

- *California Travel Impacts by County, 1993* - Using an econometric model, CalTour develops state and county travel expenditure estimates broken down by category of expenditure and by type of accommodation used by travelers. The contribution of travel and tourism to the overall state economy is also analyzed and charted. This report is widely used by local and state agencies, visitor bureaus and chambers of commerce, hotel developers, appraisers, planners, and lending institution as a reliable, unbiased source of travel trend data.

Budget

CalTour: \$46,500

Socioeconomic Impacts

In FY93-94, the Division commissioned and published a study entitled *Travel and Hospitality; Working for California*, which addressed for the first time how tourism-related employment benefits women, young people and minorities. Not surprisingly, this study has raised additional questions and issues requiring further investigation. The Division will continue its efforts to document tourism job creation and impacts. The specific focus of the next study has not yet been determined.

Budget

CalTour: \$12,000

Program Evaluation/Return on Investment

Each of the hundreds of programs and activities undertaken by the Division every year has specific objectives and desired outcomes. It would be ideal if the state were able to determine how many visitors came to California as a result of these programs and how much spending was generated. Comparing total program costs with the benefits to the state in terms of tax revenues from visitor spending would then yield the state's Return on Investment(R.O.I.). However, because of the diversity of the programs in this marketing plan and since the Division does not actually sell any tickets to travelers or book any trips, there is no single mechanism for tracking visitor volumes directly attributable to state initiatives.

Research efforts continue to seek the development of credible measures of R.O.I. Some evaluations are formal, others are informal, depending on the type of outcome expected. Evaluations will include expenditures and job estimates linked to specific programs, such as literature and fulfillment, whenever feasible, but will also include other indirect measures of program effectiveness, such as awareness and interest in traveling to California.

- *1994 Advertising Effectiveness Study* - Begun in February 1994 prior to the launching of California's Spring ad campaign, final results of three survey waves will be presented in early Fall.
- *1994 Literature Effectiveness Study* - How the state's Visitor Guide influenced trip decisions and length of stay will be addressed through telephone surveys conducted by San Francisco State University.
- *Focus Groups* - Focus groups are planned for Chicago and Seattle, two primary markets representing the different characteristics of short haul and long haul traveler. Consumer reactions and expectations regarding the faxed Tip Sheets used to generate trip ideas during the Spring campaign will be explored. Responses will guide design and content of future Tip Sheets.

Budget

CalTour: \$25,500

Domestic Market Research

The Division of Tourism compiles and disseminates detailed demographics and trip characteristics of domestic visitors to California. This information is needed by new businesses and investors exploring the market potential of visitor-related products and services, existing businesses considering expansion, organizations planning advertising and marketing campaigns, and by governmental agencies assessing the demand placed by visitors on public services and facilities.

- *1993 Domestic Visitors to California* - Based on a syndicated monthly travel survey of over 30,000 U.S. households.
- *Monthly Monitor of Domestic Travel to California* - **(New)** Monthly and year-to-date bulletins on current domestic travel patterns.

Budget

CalTour: \$62,400

International Market Research

International visitors contribute over \$12 billion to the state economy annually and account for as much as 20 to 30 percent of the business at many of the state's hotels, motels, and attractions. The Division conducts primary and secondary research, supplementing available data with special studies as needed.

- *1994 Overseas Visitors to California* - CalTour obtains data directly from the *Inflight Survey of Overseas Visitors* conducted on behalf of the U.S. Travel and Tourism Administration (USTTA).
- *Monthly Monitor of Overseas Travel* - **(New)** Monthly data on Los Angeles and San Francisco arrivals from key overseas markets. Part of Travel Barometer
- *Mexican Air Travel to California* - An analysis of California-bound air travel from Mexico, also overseen by USTTA.
- *Canadian Air Travel to California* - **(New)** Cooperative venture between USTTA, Statistics Canada, and participating states.

Fact sheets and market highlights are prepared and updated as needed for conferences, workshops, briefings, and other purposes.

Budget

CalTour: \$22,000

Newsletter/Communications

To communicate research to a broader audience of California tourism companies and destinations, a quarterly tourism research newsletter is being developed, with the first issue scheduled for late Spring 1993. This newsletter contains research findings, excerpts from research journals, trends to watch, and feature articles on topics relating to domestic and international research methodology and findings to assist them in better promoting travel to California.

- *Research Insights* - Recent findings; summaries of articles and reports from other publications; marketing implications; new studies.
- *California Travel Barometer* - **(New)** Most currently available indicators relative to domestic and international travel, airport arrivals, highway traffic, etc.

Budget

CalTour: \$40,000

Special Projects/Reserve

The OT research program responds to approximately six to twelve telephone and written requests for statistical data each day. The information provided is not available in any other single location within California and is essential to California's remaining competitive in attracting tourism economic investment and expansion. Research association membership and conference fees, library and software purchases, and special projects which arise from time to time are also included in this line item category.

Budget

CalTour: \$10,900

COLLATERAL AND FULFILLMENT

An essential function of CalTour is to develop and disseminate information about California to travelers and the travel trade. This is done through publication of collateral materials, such as: a general visitor guide, a travel trade guide, a quarterly magazine, regional brochures, a state map, a ski guide, and a guide to unusual adventures throughout the state. Distribution, or fulfillment, is made through the use of a toll free telephone number, response by "fax on demand," and the internet. Requests for visitor information are stimulated mostly by CalTour advertising. San Francisco State University conducts a rigorous study of the cost effectiveness of the advertising and collateral and fulfillment programs.

California Tourism Publications

Background

CalTour has significantly reduced the cost of producing visitor information through the use of advertising supported publications. CalTour's publisher (MH West) produces three publications for the State under the *Golden California* masthead: a visitor guide, a travel planner's guide (travel agents) and a quarterly magazine.

Golden California Visitor's Guide

Objectives

- To publish 300,000 visitor information guides for people planning trips to California
- To showcase the vacation opportunities available in rural regions of the State as well as in primary destinations.
- To promote extended length of stay by providing comprehensive trip-planning information.
- To provide the private sector with a targeted opportunity to advertise to domestic consumers who have shown a specific interest in visiting California.

Description

The Golden California Visitor Guide is a comprehensive directory to visiting our state including editorial features on favorite activities within each region of the state to assist vacationers in planning their trips. It includes visitor information sources, points of interest and regional maps. 300,000 guides will be printed and distributed as the flagship fulfillment piece.

Measurement

300,000 copies are distributed annually through Welcome Centers, USTTA offices, the travel trade, tourist information offices throughout the State, and trade and consumer shows.

Budget

CalTour: \$0

Private Sector Contribution: Advertising supported

Golden California Travel Planner's Guide

Objective

- To provide 66,000 travel agents and tour operators with a comprehensive reference piece on California better "sell" their clients on all the attractions of the State.

Description

This 200-page guide provides information on the 12 regions of California, lists ground tour operators, accommodations and group rates, suggested tour itineraries and visitor information sources.

Budget

CalTour \$0

Private Sector Contribution: Advertising supported

Golden California Magazine

Objective

- Provide two million motorists entering California at Agricultural Inspection Stations with a magazine about visiting the state that provides for a more positive introduction to California and encourages them to explore the State more fully.

Description

This four-color, 50-page, inexpensive magazine is produced under a cooperative agreement with the Department of Food and Agriculture's Pest Exclusion Branch. It is distributed at Agricultural Inspection Stations along the State's border, though the publisher is seeking additional distribution points.

Budget

CalTour: \$0

Private Sector Contribution: Advertising supported

California State Map

Objective

- To provide 300,000 California state road maps to travelers planning trips to California.

Description

A map is the most highly requested item produced by CalTour. For the past year, Sunset Publishing has produced, at no cost to the State, 300,000 copies of a map of California for distribution to people planning trips to California.

Budget

CalTour: \$0

Private Sector Contribution: Advertising supported

Student Packets

Objective

- To provide grade school children who write to the State of California with solid information to help them write their reports about California.

Description

In every grade school in America, children are assigned to write to state governments and request information. The California Division of Tourism receives 40,000 such requests, each year. Additional requests are received by the Secretary of State and Governor's offices. Responding to these children has little to no value in stimulating tourism within the state. However, not responding quickly and fully to the children's inquiries creates a public relations

black eye for California. Although this does not satisfy the Legislature's intentions in funding CalTour and although it reduces the funds available to conduct tourism marketing, CalTour can see no other acceptable alternative but to provide specialized packets to school children.

In the past, CalTour sent its regular visitor information packet to children writing to the state, but this was expensive and took valuable visitor information out of the hands of potential, legitimate travelers and into the hands of kids writing school assignments. Also, the basic visitor information kit does not contain the kind of information that teachers want the kids to write about, such as: how the state government is structured, the various official state birds, songs, trees, mammals, etc. So, CalTour intends to find corporate sponsors who will underwrite the printing of booklets specifically intended to answer student questions. CalTour has developed a guide based on the most frequently asked questions and will use this guide as the basis for the booklet.

Budget

CalTour: \$0

Golden California Special Events

Objective

- Provide visitors reasons to travel throughout California.
- Identify California's ethnic events and encourage visitation to them.
- Heighten interest among consumers to tour the California Countryside.

Description

In 1992, CalTour's Special Events calendar was combined with an Ethnic Calendar for the purpose of reducing cost and duplication and increasing exposure and consumer interest in ethnic events. The resulting product was a high-quality, 30-page guide listing more than 600 of California's special events and ethnic festivities. The 1993 Special Events calendar was further expanded by the addition of numerous arts events throughout California, increasing the number of listings to more than 1,000 events.

Measurement

300,000 calendars are disseminated each year through visitor requests and consumer and trade shows. It is among the most requested and depended upon items produced each year by the Division of Tourism.

Budget

CalTour: \$70,000

Regional Brochures

Objective

- To provide regions with handouts which can be used to promote their area at consumer and trade travel shows.

Description

100,000 copies of 12 brochures, one for each region of the state, will be printed and made available for use at consumer shows and for regional marketing.

Measurement:

This is the kind of element that is extremely difficult to measure, yet essential to marketing the State. The value of these brochures is perhaps best measured subjectively, on the bases of public and industry response to the brochures. That is: do consumers pick them up and does the industry request them for use in visitor centers and consumer shows.

Budget

CalTour: \$0

California Adventures & More

Objectives

- To encourage visitors to experience hard-to-find adventure-oriented activities primarily found in California's rural communities.
- To educate the consumer about the exciting activities the "California Countryside" has to offer.

Description

Tour operators and the travel media have asked for a guide that will help them develop tours that include California outdoor adventures, such as: fishing, boating, rock climbing, hiking, camping, horseback riding, racing, ocean kayaking, water skiing, sail planing, hot air ballooning, etc. Because of the small distribution list, ever-changing nature and extensive research necessary for such a guide, it is not economically feasible to have this publication supported with advertising. Because of the extensive amount of research necessary, an intern has been assigned to update the guide. It is maintained on computer and updated annually.

Budget

CalTour: \$10,000

IT Network

Objectives

- To provide increased access to visitor information through telephone books

Description

IT Network and Pacific Bell are developing a new visitor guide at the front of select phone books in the San Francisco, San Diego and Sacramento phone books. CalTour will serve as liaison to the project assuring accuracy and balanced representation of California destinations. CalTour's 800 line will be listed at no cost in return for assistance given to the phone company.

Measurement

IT Network and Pacific Bell will provide CalTour with call volumes.

Budget

CalTour: \$0

California Welcome Centers

Objective

- To provide California travel information to consumers at major visitor information centers throughout the state.

Description

It is anticipated that legislation will pass this year establishing California's first visitor information centers, to be called California Welcome Centers. Inquiries have been received from a visitor information center located in Kingsburg, California about being designated as the state's first Welcome Center and applications for additional centers will probably arise in 1995 should the legislation pass. The concept favored by CalTour is similar to a franchise which the State issues in return for revenue and meeting specific criteria.

Budget

CalTour: \$0

Internet

Objective

- To provide California travel information to consumers, the travel trade, travel media and the travel industry at low cost via the Internet.

Description

CalTour intends to develop an Internet home page, as a sub-page of the State and TCA home pages. The CalTour page will include such categories as: general information, accommodations, attractions and arts, recreation and sports, public lands agencies, events, camping, restaurants, etc.

Budget

CalTour: \$0

Electronic Kiosks

Objective

- To provide California travel information and reservation/ticket purchase services to consumers at remote locations throughout California.

Description

CalTour intends to issue a contract for the development, installation and operation of visitor information kiosks. The kiosks, would be installed beginning in late 1995. The kiosks will provide visitor information for locations throughout the state, with capability for transactions that potentially could produce revenue to fund statewide tourism marketing efforts.

Budget

CalTour: \$0

Fulfillment

Objectives

- To provide 24-hour, touch-tone assisted, toll-free, telephone response to visitor inquiries for travel information
- To provide fax on demand response to visitor inquiries

- To provide callers with a variety of delivery methods at the lowest cost possible to CalTour and the caller.
- To send 225,000 visitor information packets

Description

A fulfillment company, DPAS, located in San Francisco has been contracted to manage CalTour's fulfillment program including answering calls to CalTour's toll free telephone line and packing and sending materials to consumers and the travel trade.

Accommodations guides produced by the California Hotel & Motel Association, California Lodging Industry Association, California Association of Bed & Breakfast Inns and California Travel Parks Association are distributed by CalTour. The first three guides are inserted into visitor information packets.

A guide to State Parks is also included in nature-specific packets and the Ski California guide is placed in winter sports packets.

Measurement

A pre-post conversion study will be conducted to monitor the effectiveness and return-on-investment of the Collateral and Fulfillment program.

Budget

CalTour:		\$880,000
Postage:	\$535,000	
Fulfillment contractor:	\$345,000	
Private Sector Contributions:		
CABBI	\$50,000	
CH&MA	\$50,000	
CLIA	\$50,000	
CTPA	\$10,000	

IN-STATE MARKETING

In-state Overview

As stated in the Marketing Strategy, CalTour also promotes travel to lesser-known or underutilized destinations. The CTC has defined them as being the eight rural regions of California: North Coast, Shasta Cascade, High Sierra, Gold Country, Central Valley, Central Coast, Inland Empire and Deserts and California's urban ethnic communities.

Advising the CTC on how to best direct the marketing effort toward these lesser-known destinations are two committees: the California Countryside Committee, which is comprised of eight voting members (one from each rural region) who have been elected by destination marketing organizations within their regions (chambers of commerce and convention and visitor bureaus) to represent the entire region, and the California Multicultural Tourism Committee. Both committees advise the CTC and CalTour as to what projects will best promote travel into lesser-known and under-utilized destinations. The committees meet four times per year. Eight members from each committee meet twice with the full marketing advisory committee.

Additionally, a natural resources interagency committee, comprised of representatives from CalTour, the California Countryside Committee, California Arts Council, California Film Commission, State Parks Service, U.S. Forest Service, National Parks Service, State Fish and Game, Bureau of Land Management, and CALTRANS meet annually at the invitation of CalTour, to discuss means of improving tourism opportunities on public lands.

Some of the best opportunities for tourism to rural communities comes from international tourism. German travelers, for example, take three weeks vacation dutifully every year and they enjoy exploring the countryside by private vehicle. It is extremely expensive for rural communities to develop international tourism. That is why the support given by CalTour is so essential for these lesser-known destinations.

Research has also illustrated the value of educating California residents that there is an entire world of vacation opportunities available right in "their own backyard." Approximately 80% of the \$56 billion generated from tourism in California results from in-state travel by California residents. Competing destinations outside California - both domestic and international - target California residents, because our populace spends millions traveling each year. Therefore, it is useful, particularly for communities that lack the resources to market on their own that part of the State's marketing plan be used in ways that keep Californians traveling within the state. More than half of the trips taken by Californians are extended day trips, mini-vacations or longer excursions throughout the state. It is this population base that keeps California as the number one travel destination in the U.S.

CalTour's role with respect to marketing within the state has been to encourage and help lesser-known and under-utilized destinations within the state to work together in educating Californians about the many undiscovered destinations to be found within California. CalTour serves as a "catalyst" in bringing together competing micro-destinations to work together within marketing groups. Seed funding is used to generate further investment by members of these groups and to conduct marketing that would not otherwise occur.

That is the essence of the regional marketing approach that was begun in 1984 under the banner, "Discover The Californias." Regional marketing helps travelers discover a variety of choice. However, it can also be confusing, as travelers tend to pick destinations on the basis of their

own interests. However, the theme line "Discover The Californias" has proven to be confusing to people, particularly to those who live outside, so it is no longer used.

In light of the current economic situation, coupled with recent tragic events, the State will employ a variety of programs to effectively "sell" Californians on taking additional in-state trips. The in-state marketing effort for next fiscal year will be directed primarily into targeted promotional opportunities designed to accommodate cooperative partners and expand upon successful non-advertising programs initiated in prior years.

In-state Target Audiences

Audiences vary by program. However, principal audiences include:

- Couples, aged 25-plus with household incomes exceeding \$35,000
- Parents aged 25-54 with household incomes exceeding \$35,000
- Tour operators
- Travel agents
- Travel consumer and trade media
- Ski vacationers from select markets

In-state Timing

Year-round: • Countryside Grants
 • Media Relations

Winter/Spring • Ski California

In-state Strategies

- To create and distribute specific information and incentives on the regions of California and their special events.
- To assist the California ski industry in maintaining its highly successful promotions to keep California skiers on California slopes and develop new markets.
- To generate positive, travel-related publicity for the "California Countryside" throughout the year.
- To develop programs benefiting California's ethnic communities and minority markets.
- To incorporate the use of the California arts as a lure to visit the "California Countryside. "

In-state Tactics

Region-specific Grants

Objective

When the State established tourism regions, it provided increased opportunities for tourism entities within the new regions to promote collectively, but it also placed increased costs upon the tourism marketing organizations within these regions for region-wide promotional activities. To offset these costs, CalTour has provided grants to the regional promotional organizations for region-directed marketing activities. This softens the burden of region-wide marketing.

- To encourage competing destinations within the state's eight rural regions to work together for the purpose of stimulating increased tourism within those regions.

Description

CalTour provides grants of \$10,000 per region to the eight countryside regions. These funds must be used for region-wide promotion only. Each elected regional representative must present a marketing plan for use of the funds and guidelines regarding how the funds may be expended must be followed. Regional representatives are allowed to develop plans that effectively market their region, in that each region has different objectives and audiences. Generally, the regional marketing programs include: brochure development, consumer and trade shows, publicity development, and advertising.

Measurement

In the past, the marketing plans provided by each region were assessed as to their effectiveness by CalTour. In the future, regional representatives will be required to submit a report no later than the end of each calendar year in order to be eligible for funds in the following fiscal year. These reports will articulate how the funds were expended, include samples of produced work and include measurement of contacts made, brochures distributed, business booked, etc.

Budget

CalTour: \$80,000

California Getaways

Objective

- To inform Californians about the California Countryside
- To stimulate increased travel into the California Countryside

Description

CalTour produced a 13-week series of radio features about events and destinations to visit in the California Countryside. These 60-second radio features appeared as news features on 34 radio stations throughout the state including major stations in: Sacramento, San Diego, Riverside, San Francisco and Fresno. Each spot mentioned CalTour's toll free telephone line 800-862-2543. In FY 94/95, CalTour intends to extend the series year-round.

Measurement

The 800 line will be used to measure response, as an extension number will be added to the features in order to identify that the call originated from the radio features.

Budget

CalTour: \$50,000

Multicultural Travelogue

Objective

- To inform travelers of the variety of positive tourism experiences to be discovered in California's ethnic communities and stimulate visitation to these communities.

Description

A video documentary will be produced that communicates that California's multiethnic society is another great reason to visit California. The video will be provided to public television

stations throughout California. Sponsors will be sought for placement of the travelogue on cable networks or in syndication.

Measurement

Subjective measurement of the quality of the resulting video. Acceptance of the video by public television stations. Sponsorship of the video on targeted media. Viewer response. Increases in visitation to depicted destinations. This is a two-year project, so evaluation will not fully be accomplished until the video is finished.

Budget

CalTour: \$35,000
Private Sector Contribution: In-kind support

Ski California

Objectives

- To attract international and domestic skiers to California's ski resorts
- To encourage Californians to ski at California ski areas

Description

One year ago, hardly any Britons skied in California. CalTour proposed combining California skiing with California's other great vacation destinations to the California Ski Industries Association and has since made California a major destination for British skiers. In the first year, 3,500 Britons skied in California. We anticipate that 5,000 British skiers will travel to California this winter, all resulting from the CalTour/CSIA coop program. This program has grown from a modest \$60,000 brochure into a \$670,000, multi-faceted, cooperative marketing program that is considered one of the most effective in the United States.

Conducted in partnership with the California Ski Industry Association and other private sector partners, such as Virgin Atlantic Holidays, United Airlines, Times Mirror Publications, Coca-Cola, etc., this year's campaign will extend the reach of past promotional efforts into new domestic and international markets.

The campaign, begins in November with promotions directed to the domestic markets of Chicago, Dallas, Los Angeles, San Francisco, New York, New Jersey and Florida. International target markets include the United Kingdom, Australia, New Zealand, Mexico and South America. Promotional efforts planned include cooperative advertising, participation in specific ski industry trade shows and sales missions, organization of familiarization tours, foreign language brochures and various implementation and publicity-related activities.

In addition, the program will involve the production and distribution of 400,000 Ski California magazines.

Measurement

Program effectiveness will be assessed according to each individual activity. Trade shows and sales missions will monitor leads generated and quality of participation by the travel trade or consumer at specific events. Advertising campaigns will be monitored by tracking the inquiry

rates to individual resorts and tracking of specific package sales. Publicity efforts will be monitored by resulting story coverage. Long-term results will be established by studying overall market share figures. Direct participation by travelers on ski packages related to the program will be measured.

Budget

CalTour:	\$170,000
CSIA and private partners:	\$500,000

California Countryside Arts Festivals

Objectives

- To stimulate urban visitation to rural regions through the use of region-wide arts festivals

Description

A joint arts and tourism initiative between the California Arts Council, the California Division of Tourism and local arts councils and tourism visitor bureaus. The California Countryside Festivals will serve as a marketing umbrella which tie together and support all of the appropriate new premiere festivals as well as existing festivals taking place in the Central Valley in the fall of 1994 and in the Gold Country in the Spring of 1995.

Measurement

This program will be evaluated on the basis of public participation at the festivals.

Participation of communities and attendance will be the primary means of measurement although willingness to bring together tourism and the arts has already exceeded expectations, thus adding to the initial success.

Budget

CalTour:	\$40,000
California Arts Council contribution:	\$40,000
Private contributions:	Unspecified

Consumer Shows

Objective

- To promote California Countryside destinations to Californians attending major consumer shows in Orange County, Los Angeles, and Sacramento.

Description

CalTour will purchase exhibit space at three major consumer travel shows and staff the booth at these shows. Rural regions will be allowed to exhibit inside the California booth.

Measurement

Brochure distribution at the shows. Consumer attendance of the shows. Evaluation by participating regional representatives.

Budget

CalTour:	\$5,000
Private Sector Contribution:	In-kind support

Editorial Visits

Objective

- To meet with travel writers and editors located inside California for the purpose of helping them develop travel itineraries, answering their questions, informing them of new or unknown travel opportunities and thus stimulating increased editorial coverage of California destinations.

Measurement

Press clippings will be collected and values of each article, based on ad equivalency, will be assessed.

Budget

CalTour: \$0

Private Sector Contribution: In-kind support

Photography

Objective

To maintain a comprehensive slide library in order to gain maximum exposure for California such as encouraging new story ideas or CalTour-sponsored publications.

Description

Essential to getting positive exposure in media is having at hand an excellent collection of original and high quality duplicate color images of California. The Division will continue an annual effort to document the colorful diversity of California through photography while working in close cooperation with local areas. High quality duplications of existing color slides will be made as needed.

Budget

CalTour: \$10,000

News Clipping Service and Analysis

Objective

To gauge the level of editorial coverage, both negative and positive, and to measure the amount of coverage generated through CalTour media relations efforts.

Description

The services of Bacon's Clipping Bureau have been retained to clip daily and weekly newspapers with circulation of 5,000 or more, and consumer, business and travel trade magazine coverage mentioning CalTour or featuring California as a vacation destination. The news clips will also be analyzed in terms of media value.

Budget

CalTour: \$12,000

DOMESTIC MARKETING

Domestic Overview

FY 1995/96 will continue to focus on the domestic markets with the launch of a third domestic advertising campaign. CalTour also intends to participate in select domestic trade shows and become more aggressive in its public relations, cooperative marketing and advertising efforts. This will ensure that the State's domestic marketing and advertising budget is leveraged to the greatest degree possible.

To the maximum extent possible, elements utilized in these various efforts will be creatively positioned to maximize impact during important consumer decision-making times, especially leading into the heavily traveled vacation periods of spring and summer.

Showcased will be the diversity of vacation opportunities available in California, which makes it a prime destination for domestic travelers. Whenever possible, elements will be highlighted that differentiate California from other domestic destinations, making the State a perfect alternative for those considering other states or overseas locales.

Domestic Target Audiences

- Adults who took a trip of 100 miles or more away from home during the past 12 months
- Parents, 35 plus years of age (skewed female) with household incomes in excess of \$50,000 per year.
- New visitors
- Repeat visitors

Domestic Timing

- | | |
|---------------|--|
| Year-round: | <ul style="list-style-type: none">• Fun Spots marketing• Press trips/tours• Publications• Travel trade shows |
| Winter/Spring | <ul style="list-style-type: none">• Target market television• Target market radio• Target market supplements• Pre-post research• Target NTA tour operators |

Domestic Strategies

- To heighten positive top-of-mind awareness of California's diversity and increase the desire to visit California as a tourism destination throughout the U.S.
- To generate in excess of \$3 million in private sector support to assist the State in communicating California's unique offerings and attractions.
- To effectively educate and motivate the travel trade with special promotions, familiarization trips, and sales calls promoting California in targeted markets.

- To generate 300,000 telephone and reader service inquiries from prospective vacationers and, as a result, stimulate potential visitors to travel to California via widespread distribution of the consumer fulfillment guide.
- To support the domestic advertising effort with a strong, positive publicity campaign on California and its 12 regions.
- To create broad-based promotions which complement the goals and objectives of the overall domestic marketing campaign and motivate private sector participation.

Domestic Tactics

Consumer Advertising

Objective

- To motivate first-time and repeat domestic visitors to consider California for their vacation;
- To provide a presence for California in major national magazines and on network and spot TV during the critical travel planning season;
- To complement the target marketing program with an advertising program;
- To generate interest and inquiries for vacation planning information from the Division of Tourism;
- To stop the decline of market share experienced in major western out-of-state leisure travel market; and
- To boost travel trade inquiries.

Description

A separate Advertising plan is available which provides detailed analysis of this element.

Television commercials are the backbone of this advertising plan. The broadcast campaign includes both national buys and a highly targeted spot markets. Backing up the TV buys will be 1/3-page black and white print ads, intended to provide additional exposure for the toll free telephone number.

The call to action is for viewers and readers to call CalTour's 1-800-GO-CALIF number seen in all print and broadcast ads. Prospective visitors will also have the option of receiving California Tip Sheets by fax within five minutes.

Measurement

Measurements utilized to judge campaign effectiveness will include pre-post campaign awareness studies, inquiry rates, reach and frequency goals and overall increases in domestic market share on a long term basis.

Budget

CalTour: \$2,600,000

Marketing Consultant

Objectives

- To provide general marketing support to CalTour
- To develop cooperative marketing campaign ideas

Description

Jim Garber and Associates has been retained to augment CalTour's ability to develop and execute domestic and international marketing activities.

Measurement

The contractor will be evaluated on a per project basis. Criteria will include: amount of positive publicity generated for California, quality of creative projects undertaken, amount of successful cooperative programs introduced and other performance-related measures will be exercised.

Budget

CalTour: \$80,000

California Fun Spots Co-op Promotion

Objective

- To provide the State with a major national promotional campaign primarily reaching distant domestic markets.
- To organize and unify the theme parks industry into a cooperative marketing unit working together to achieve mutual goals and objectives.
- To promote, via attractions and special offers, California as a vacation destination.
- To effectively utilize the value of the participating attractions, as a cohesive group, to attract cooperative advertising support from an airline by conducting trade shows in key market cities.
- To dramatically showcase a unique collection of theme parks which cannot be found in other states or international destinations.

Description

The Fun Spots group is a cooperative marketing team comprised of eight of California's most popular attractions. They are: Disneyland, Knott's Berry Farm, Marine World Africa USA, Monterey Bay Aquarium, San Diego Zoo, San Diego Wild Animal Park, Sea World and Universal Studios Hollywood. Two programs will be presented by the Fun Spots group in 1994/95. The first will be a couponing discount opportunity presented in the State's official consumer fulfillment guide. The second will be a special "Fun Spots for Free" effort where an airline offers "free" attractions tickets to its passengers booking a California vacation. The airline pays the attractions for the tickets at a much reduced value.

This year, CalTour will also extend this successful campaign to the United Kingdom, partnering with British Airways.

Measurement

The number of coupons redeemed at the attractions, plus the number of packages sold by the airline, will be the primary measure used to judge campaign success. The amount of national media purchased in support of the "Fun Spots for Free" by our airline partner also will be a criteria for success. This media gives national exposure to the attractions which they could not afford to purchase independently.

Budget

CalTour: \$180,000

Attractions: \$225,000

Delta Airlines: \$350,000

British Airway: \$350,000

Trade/Consumer Shows

Objectives

- To provide an umbrella for California suppliers and DMOs to participate in key domestic trade shows.
- To provide the rural regions with opportunities for mass distribution of literature to targeted domestic markets.

Description

Based upon past success, CalTour will participate in the American Airlines Fly Away Vacations trade and consumer shows and in state trade and consumer shows.

Other California suppliers and C&VBs will be encouraged to participate with CalTour to create a unified presence.

Measurement

Level of private sector participation and delegate feedback reflect the extend to which program objectives are being met. Indicators may also appear on fulfillment monthly reports after visiting target cities. Long-term success will be measured by the new and expended tour itineraries ultimately developed by targeted tour operators.

Budget

CalTour: \$10,000

Familiarization Tours

Objectives

- To educate tour operators concerning tour itineraries available in all of California.
- To increase mid-week and off-season visitation.

Description

Familiarization tours will be created by the State to showcase to tour operators the value of developing itineraries which encompass the rural regions of the State.

Measurement

This program will be evaluated by tour operator participation; private sector assistance with in-kind contributions in support of the fams; and eventually the amount of tour operator itineraries developed as a result of the fams.

Budget

CalTour: \$5,000

Private Sector Contribution: In-kind support

National Tour Association

Objective

- To develop strategies for maintaining and increasing domestic group travel to California through a “higher profile”.

Description:

CalTour brings together California tourism businesses and destinations in several efforts aimed at improving tour operator knowledge of, access to and interest in California as a destination for organized group tours.

A California directory of NTA members is published and distributed to tour operators to assist these operators in contacting California representatives.

NTA tour operators are told that California offers personalized fam tours year-round, to help them learn about new places to take their group tours.

A reception, sponsored by California businesses and destinations, is coordinated by CalTour at NTA's Spring Tour & Travel Exchange and at the NTA Leadership Luncheon.

Team California hosts the tour operator retreat finale dinner. This event allows California maximum exposure amongst an exclusive group of operators

CalTour also coordinates a contest sponsored by visitor bureaus, hoteliers, car rental agencies, airlines and attractions for California vacation giveaways awarded at the NTA annual convention. In addition, special educational and promotional materials that enhance the State's appeal are made available to NTA members at the annual conference.

Measurement:

California's leadership of this committee has resulted in increased exposure for the State among tour operators. An extremely high number of entries was received for the vacation giveaway program at NTA, with 209 tour operators participating, a 41 percent penetration of a key audience.

Budget

CalTour:	\$20,000
Private Sector Contribution:	\$29,750

American Bus Association

Objectives

- To stimulate motor coach operator interest in California tour opportunities

Description

CalTour will exhibit at the American Bus Association annual convention and meet with motor coach operators to encourage them to increase the number of tours they operate within California.

Measurement

CalTour has not previously attended this show and will evaluate based upon interest by attendees, numbers of meetings and an assessment of resulting new business.

Budget

CalTour:	\$1,000
----------------	---------

American Airlines Fly AAWay Supermarket and Fun Jets Southwest

Objectives

- To stimulate travel agent interest in California tour packages offered by American Airlines and Southwest Airlines

Description

CalTour will exhibit at the American Airlines Fly AAWay Supermarket and Fun Jets Southwest in order to meet participating travel agents, inform them of California tour package opportunities and stimulate increased sales of California tour packages.

Measurement

CalTour will evaluate based upon interest by attendees, numbers of meetings and an assessment of resulting new business.

Budget

CalTour: \$3,000

News and Feature Releases

Objectives

- To provide 700 travel consumer and trade reporters and editors with quarterly “What’s New” releases from which they can develop stories or excerpt for their publications.
- To provide 700 travel consumer and trade reporters and editors with feature articles from which they can develop stories or print as is.

Measurement

Press clippings will be collected and values of each article, based on ad equivalency, will be assessed.

Budget

CalTour: \$25,000
Publicity Value: \$100,000

NY/Chicago Media Blitz

Objective

To meet with and influence travel writers and editors in their headquarters cities for the purpose of educating them about what is new in California and stimulate resulting editorial coverage of California travel destinations.

Measurement

Press clippings will be collected and values of each article, based on ad equivalency, will be assessed.

Budget

CalTour: \$50,000
Private Sector Contribution: Entertainment expenses

"What's New in California" Releases

Objective

- To have informational updates placed in travel roundup and event listings in major media outlets.

Description

Updated quarterly, the release is a vehicle for informing the consumer and travel trade media of new developments, attractions and other timely events happening throughout California.

Measurement

Clippings generated and level of interest by consumer and travel trade media will be utilized to judge success.

Budget

CalTour: \$10,000
Publicity value: \$50,000

In-state Media Relations

Objectives

- Provide ongoing communication and place California story ideas with key press, contacting at least 20 writers per month.
- To meet with key travel editors and writers and broadcast media with the goal of generating positive publicity on California during vacation planning periods.

Description

A major part of an effective media relations program is ongoing contact with the media. Editorial visits will be made to print and broadcast media in New York and Chicago.

Measurement

The program is evaluated by media contact reports and subsequent news clippings. The value of the publicity received takes into account the station or publication advertising rates and the size, length and tone of story.

Budget

CalTour: \$0
Publicity value: \$1,000,000

INSIGHTS Newsletter

Objective

- To inform California's travel industry about CalTour's marketing activities so that they will be able to take advantage of them.

Description

This publication, published on a quarterly basis, is designed to be the primary communication piece of the Division of Tourism, directed to the tourism industry and all interested public officials. Information contained in the publication will include ongoing activities of CalTour, new travel research data, tourism briefs, and guest columns covering topics of interest to California's tourism industry.

Budget

CalTour: \$37,000

Society of American Travel Writers

Objective

- To sustain relations with key North American travel writers, broadcasters and editors and to stimulate interest in story concepts.

Description

The development and nurturing of relationships with the travel media is essential to gaining positive editorial coverage for California. As a member of the prestigious and exclusive Society of American Travel Writers (SATW), the media relations manager will attend the organization's annual conference in Dublin , Ireland, October 20-25, 1994, and the western chapter meeting in Spring 1995. Attendance at the SATW conferences gives CalTour a distinct advantage in developing editorial coverage about California, compared to the access which other states have to these writers.

Measurement

Contacts made, editorial coverage received.

Budget

CalTour: \$3,000

INTERNATIONAL MARKETING

International Overview

The U.S. and California continued to experience a series of both man-made and natural disasters in 1993-94 which resulted in stifling international visitation. The Southern California Northridge Earthquake in January 1994 significantly disrupted the attraction of California as a travel destination. Together with seasonal brush fires and the ever present threat of crime against travelers, foreign visitors plans to visit California were somewhat challenged.

Significant events within key markets also affected travel. Mexico encountered a sudden devaluation of its Peso in January 1994 which will have a tremendous impact on visitation from that country. After years of continued growth, Germany's reunification efforts finally settled in and resulted in a 1 percent market share decline in 1993, where Canada's continued struggle with the devaluation of its dollar has reduced the number of Canadians crossing the border. Other key markets maintained consistent market share or experienced slight increase. Overall, California recorded a 1.5 percent increase in market share overall for the year 1993. A portion of this increase may be attributed to California's involvement in the World Cup Soccer Championships which may have bolstered the visitation from those countries represented by teams in the contest, such as Brazil and Argentina.

The year ahead is also faced with many of the same challenges as previously mentioned, especially the threat of crime against tourists and unforeseen natural disaster. If California can avoid being associated with any major negative incidences, we may see a strengthening of California's position in the international marketplace.

International Target Audiences

Canada:	Air travelers from western provinces Drive market from British Columbia and Alberta Snowbirds Purchasers of motor coach and fly-drive packages
Western Europe:	Middle and upper-income fly-drive travelers Users of all-inclusive package tours
Pacific Rim:	First-time purchasers of standard packages Special interest travelers/honeymooners/students
South America:	Middle and upper-income Brazilian and Argentine travelers First-time purchasers of standard packages

International Timing

Fall 1994:	Trade/Shows & Sales Canada World Travel Mart Pow Wow Europe Osaka Travel Fair World Travel Fair (Tokyo) La Cumbre trade show (South America) U.S. Travel Fair (Korea) Japan/Asia sales mission
------------	--

Travel Trend Show - Frankfurt
Media and travel trade fairs (Canada)
California Dream Days (November-February)

Winter 1994: California Dream Days (through February)
Expo Vacaciones (Mexico)/Mexico Sales Mission
ITB, Berlin (International Tourism Exchange)
Travel trade fair trips (United Kingdom and other markets)
South America Sales Mission

Spring 1995: TIA Discover America Pow Wow
International travel trade fair trips
UK/Germany Sales Mission
European Incentive Business Travel Market

International Strategies

- Maintain high visibility consumer and trade programs in Canada as developed in previous years.
- Maintain public relations and promotional programs in Europe and Japan, whenever possible.
- Continue trade mission schedules, at present, with the flexibility to add or delete based upon future world events.
- Maintain trade relationships and private-sector partnerships.
- Keep the international programs and budget flexible so that the State has the ability to react with optimum effectiveness to major world events which could impact international, domestic and local travel patterns.
- Reach the consumer, whenever possible, through the leveraged special promotions.
- Overall objectives are:
- To maintain as best as possible international travel-related expenditures and employment generated by the foreign visitor.
- To increase the State's market share of international visitors to the U.S. from its key foreign markets (Canada, Western Europe and Japan) and secondary markets (Australia/New Zealand, Korea, Mexico and South America).
- To increase the level of knowledge about California's cities and lesser-known destinations among international wholesalers, tour operators and retail travel agents.

International Tactics

California Dream Days Co-op Promotion

Objectives

- To generate off-season visitations from Canadian consumers to California.
- To encourage Canadians to travel to and through as much of California as possible.

- To leverage State financial resources with Canadian cooperative partners to generate extensive advertising and promotional support in selling California as a destination.

Description

California Dream Days is a four-month promotional campaign presented in cooperation with Air Canada and Canadian Airlines International, aimed primarily at the Eastern Canada consumer and residents of British Columbia and Alberta. Discounts offered by California suppliers of 20% or more are incentives presented to Canadian consumers to visit California during the winter season.

Measurement

Utilization of the discount incentives are recorded by the participating private sector partners. Success also can be measured by California's private sector support for trade missions and fam trips and by the cooperative advertising contribution made by the airlines to the campaign. The growth/decline of load factors, on airline routes to California are also useful tools in measuring the impact of the program.

Budget

CalTour: \$80,000
Private sector commitment: \$1.5 million

U.S./JAPAN 2000 Co-op Promotion

Objective

- To double the amount of tourism between the United States and Japan by the year 2000.

Description

In an effort to further balance trade between the United States and Japan, the Japanese government has proposed a bilateral effort to double tourism between the U.S. and Japan. USTTA and the Japan National Tourist Organization (JNTO) are working cooperatively in several areas to stimulate additional tourism both ways across the Pacific. Principal marketing tools employed in this program include:

- Visit USA Catalog of all existing tours available in the United States
- Catalog of Optional Tours available to Japanese FIT travelers upon arrival in the U.S.
- Six press trips per year for three years involving hard news journalists to demonstrate traveler safety and security stories throughout the U.S.

CalTour has invested time and money in the execution of these cooperative programs. The Director of Tourism is serving as coordinator of western press trips and liaison to eastern press trips. \$100,000 in funds, over two program years, have been dedicated to production of the catalogs, with California receiving proportionate space to its investment.

Measurement:

Subjective analysis of press coverage and increased purchase of California pre-packaged and optional tours by Japanese travelers.

Budget

CalTour: \$50,000
LA C&VB \$100,000

San Diego C&VB	\$25,000
Press Trip Participants:	In-kind

United Kingdom Co-op Promotion

Objective

- To stimulate British consumer interest in and increase awareness of California as a desirable travel destination.

Description

CalTour in cooperation with Color Care, the largest photo processor in the United Kingdom, and Boots, the largest pharmacy chain in the United Kingdom, will conduct a consumer promotion throughout the United Kingdom.

Thirty vacation trips for two will be offered within the promotion, half to San Francisco and the other half to Los Angeles. Areas to benefit from increased visibility will be: Orange County, San Diego, Palm Springs, Santa Barbara, Mammoth Lakes in Southern California and Monterey, Sonoma, Napa, Del Norte County and Lake Tahoe in Northern California.

Measurement

To be established on the basis of consumer response to the promotion.

Budget

CalTour:	\$45,000
Color Care	\$500,000
Boots	\$ 1,000,000
California industry	\$25,000
Cooperative partner	<u>\$30,000</u>
Total Value	\$1,600,000

“Discover the Real America” Co-op Promotion

Objective

- Secure the USA’s (and California) second largest overseas customer base from visitor erosion due to global competitive marketing.
- Capitalize on a \$1.2 million promotional vehicle to heighten awareness about California as a travel destination.

Description

As part of a long-term marketing strategy, the United States Travel and Tourism Administration (USTTA) is planning a comprehensive, fully-integrated promotional campaign which will position the United States as a destination offering a diverse product at all points of the price spectrum. The program is intended to expand tourism trade development opportunities to a broader range of public and private U.S. travel industry participants.

The campaign will include a UK Road Show, where partners will meet and present offerings to tour operators and travel agents. The show will be followed by a series of Fam Tours to partner destinations in November, December, January and March. At the same time, news bureau activities will begin with placement of theme and event focused press releases, and feature and editorial packages and scheduling of TV, radio and print interviews. And beginning in late

December, advertising coverage will begin with the positioning of posters on bus sides and kiosks and placement of print media advertising in newspapers and magazines.

Measurement

Pre-post studies will be conducted to determine advertising effectiveness.

Budget

CalTour:	\$20,000
USTTA	\$800,000
Private Partners	\$400,000

Sales Mission/Trade Shows

Objective

- To educate and sell California as a vacation destination to travel agents, tour operators and travel wholesalers worldwide.
- To provide an umbrella representation for the private sector to participate with the State in jointly presenting California to the travel trade.
- To showcase to the travel trade the diversity of vacation/opportunities available in California and to develop more rural region visitations by international travelers.

Description

A series of trade missions/exhibitions, led by the State for the private sector, will take place in Canada, Western Europe, the Pacific Rim, Mexico and South America during the year. These trips give California the opportunity to meet face-to-face with the travel trade to educate them on packages, tours and itineraries available to their clients.

CalTour will participate in the following international trade shows and sales missions based upon the input of the Division's travel trade tourism advisory committee:

USTTA Australia/New Zealand Seminars

July 2-11, 1994

In partnership with USTTA, CalTour and several California suppliers participated in a series of seminars designed to educate the Australian/New Zealand travel trade about the USA travel product. Though California continues to be a preferred long-haul destination, the experienced travelers are heading to other eastern states. The seminars offer an excellent opportunity to help recapture the Australian/New Zealander's attention.

Canada Sales Mission

September 12-16, 1994

Solely a California effort consisting of approximately 25 California suppliers. Canada represents 800,000 plus visitors a year to California. Features the top producing markets for the Golden State.

Huddle West

January 1995

Huddle West brings together international wholesalers/operators and suppliers to provide an opportunity for buyers to obtain West Coast travel products. The 1995 Huddle West show attendance was 240 supplier companies and 160 buyer companies. Huddle West has not been held in California since 1984. The expected attendance this year is 600-700 attendees, with fully one-third of the supplier base being from California.

POW WOW Europe - Milan

October 4-6, 1994

A key opportunity to meet with the smaller, lesser known European wholesale tour operators who are unable to attend the TIA Discover America International Pow Wow. Coordinated by the Travel Industry Association of America in conjunction with USTTA.

La Cumbre

September 12-16, 1994

A premiere opportunity to meet with South American tour wholesalers and retail buyers. Though in an infant stage, the Brazilian and Argentine travel markets are experiencing substantial growth. Representing travelers to California in 1993, both countries are experiencing stable and profitable economies, providing residents the financial capability to travel to long haul destinations such as California.

World Travel Market

November 14-18, 1994

Considered the largest English-speaking travel exhibition in the world, World Travel Market represents the premiere opportunity to meet with important wholesale tour operators from the United Kingdom. The United Kingdom sends more than 650,000 visitors annually to California, making it the second largest generator of overseas visitors (preceded by Japan). More than 25 California suppliers annually participate in the State's booth section in an effort to attract the attention and conduct business with some of the largest wholesale tour operators and retail agencies in Europe.

VISIT USA Korea

November 29-31, 1994

California presence and offer and brochure distribution option to participate with CalTour at the Visit USA Travel Fair in Korea this year.

World Travel Fair

December 4-7, 1994

One of the few consumer exhibitions in which the State participates. Sponsored by the USTTA Tokyo office, World Travel Fair represents the opportunity for California to distribute the "Welcome to California" brochure directly to more than 30,000 potential Japanese travelers. Japan is California's largest overseas market, sending 1.3 million visitors a year to the Golden State.

Expo Vacaciones

January 31-February 3, 1995

This show, the only concentrated travel trade effort in Mexico conducted by the State, provides an excellent opportunity to meet with the travel trade. Mexico represents California's largest visitor market, sending 2.6 million visitors a year, and is receiving increased recognition as an affluent market.

International Tourism Exchange/Berlin

March 5-10, 1994

The premiere opportunity to meet with German-based wholesale and retail buyers, media, and for the first time - consumers. Germany is California's largest generator of visitors from continental Europe, and the State's third largest generator of overseas visitors (600,000 plus annually). The USA Pavilion is coordinated by USTTA Frankfurt, and the exhibition is recognized as the largest exhibition in the world.

South America Sales Mission

March 27 - April 1, 1995

This show includes a California section at Destino USA and Visit USA Travel Expo in Brazil and Argentina. Approximately 15 California suppliers representing major attractions and primary destinations will meet with travel trade and media representatives. Both countries recently entered into the top ten generators of USA arrivals among all markets, and its citizens produce one of the highest per capita trip expenditures in California.

Measurement

Program success is measured by private sector participation, travel trade participation at California seminars and special functions, and new packages developed and reported by participants.

Budget

CalTour: \$495,000

Sales Missions - \$435,000

Trade Shows - \$60,000

Familiarization Tours

Objective/Description

- To provide opportunities for British, Dutch, German and Japanese tour operators and travel agents to explore California. learn about it first-hand and thus become better educated about selling California travel.

Measurement

Assignment of qualified agents and tour planners by participating companies. Response from participating agents, tour planners and California destinations.

Budget

CalTour: \$0

Alliances

Visit USA Centers

Objective/Description

- CalTour will cooperatively work with other states to distribute literature on the United States as a travel destination in cities where USTTA does not have an office.

Measurement

The number of brochures distributed at each center will be monitored throughout the year.

Budget

CalTour: Madrid \$1,500

Madrid - \$750

Belgium - \$750

Travel Industry Association of America (TIA)

Objective/Description

- To cooperatively work with other U.S. suppliers and states to promote the United States as a travel destination and educate the nation about the overall importance of tourism.

Budget

CalTour: \$1,500

Foreign Language Brochures

Objective

- To provide potential foreign visitors with important maps, travel tips and key travel information on California.
- To provide up-to-date information on California, in a variety of foreign languages, to the international travel trade.

Description

The State will update and reprint in German, Spanish, Portuguese, French, Italian and English a brochure to assist foreigners in planning a California vacation. Distribution will be 400,000 brochures. They will be given out primarily by USTTA offices, CalTour's international representatives, Governor's overseas offices and at international trade shows.

Measurement

Success of this element is measured by the quantity distributed over the next two years.

Budget

CalTour: \$110,000

Japanese Technical Tours Manual

Objective

- To provide Japanese tour operators with a comprehensive manual of technical tours.

Description

CalTour's Japanese Representation firm will produce a comprehensive guide to California technical tours.

Measurement

Success of this element is measured by the quantity distributed over the next two years.

Budget

CalTour: \$25,000

International Consumer Guide

Objective

- To provide expanded vacation planning information direct to consumers in English speaking markets, Spanish speaking markets and Germany.

Description

A foreign language consumer guide, produced by Greystoke, will be developed and distributed in select markets. The guide will be the first ever 8 1/2 x 11 format guide translated into English, Spanish and German. Distribution will take place in foreign, English speaking markets as well as Argentina, Mexico, Spain and Germany. Total cost of the piece is \$75,000 with approximately 50 percent being underwritten by advertising from travel industry partners. Total distribution will be in excess of 150,000 copies.

Measurement

Success of this element is measured by the quantity distributed over the next two years.

Budget

CalTour: \$35,000

Southern California International Marketing Group (SCIMG)

Objective

- To assist Southern California destinations and attractions with conducting regional marketing that serves to attract international visitation to this region.

Description

In its roles as catalyst and facilitator, CalTour has provided guidance and assistance to SCIMG, which is comprised of major DMOs and attractions in Los Angeles, Orange and San Diego Counties, for the purpose of helping them work together to bring international tourism to Southern California.

CalTour's advertising agency, J. Walter Thompson, has provided creative assistance in developing a campaign paid for by the SCIMG members to promote Southern California and CalTour's marketing agency has similarly provided marketing services.

Budget

CalTour: \$0

International Video

Objective

- To produce a 10-minute video to be used on sales missions and at trade shows for the purpose of informing international tour operators and travel agents about California's diverse destinations and attractions.

Description

The video will be produced in English, Spanish, German and Japanese versions and will be distributed through CalTour's international representatives' offices.

Budget

CalTour: \$70,000

International Representation

Objective

- To provide daily contact with cooperative promotional partners and the travel trade in the distant foreign markets of the United Kingdom, Germany and Japan.
- To utilize internationally based marketing consultants to generate and implement more effective overseas promotions than can be created from the U. S.
- To assist the California private sector in obtaining increased exposure through special promotions in these three markets.
- To obtain support staff for purposes of assisting CalTour expand its exposure through the development and implementation of effective marketing components, such as education seminars, sales missions, trade exhibitions and familiarization tours.

Description

U.K./German Representation - In partnership with the convention and visitor bureaus of Los Angeles, Anaheim, San Francisco and San Diego, CalTour has retained the marketing services

of MTTT (Supereps) in London, England and MSI (Marketing Services International) in Frankfurt, Germany. These firms will target the travel trade, developing new and maintaining current relationships with tour operators, travel agents and media representatives in an attempt to increase travel to California.

Japanese Representation - CalTour has retained the marketing services of InConTra in Japan to maintain relations with the Japanese travel trade and to assist Japanese consumers and the media in obtaining travel information about California.

Measurement

The value of these representative services is measured by the increased exposure California receives in tour operator brochures, media coverage and inquiries regarding travel to the State. It is also subjectively measured as to the effectiveness of each office in responding to requests for assistance from CalTour and the California travel industry.

Budget

CalTour: UK/Germany	\$130,000
C&VB Industry Support	\$130,000
CalTour: Japan	\$150,000

Press Trips and Editorial Visits

Objective

- To communicate California story ideas to international consumer and travel trade journalists for use in key magazines, newspapers, television and radio stations.
- To visit key print and broadcast editors and reporters in the United Kingdom, Canada and Japan with the goal of placing at least one major California story in each media outlet visited.
- To conduct press trips for individual journalists and group press trips of six to ten journalists to California from the State's primary and secondary markets.

Description

Ongoing media contact, generated from in-person visits and press trips, will be conducted during the year to assist in generating tourism gains from Europe, Japan and Canada. In many cases, media contact will be made through United States Travel and Tourism Administration (USTTA) offices on our behalf or initiated by CalTour travel trade representatives in Tokyo, London and Munich.

A "California Dream Days" press trip, conducted in cooperation with Air Canada, for Canadian travel writers is scheduled for September 29 - October 6, 1994.

Measurement

Programs will be evaluated via media visitation reports, news clippings and by placing an equivalent advertising dollar value to the articles generated as a result of an editorial visit or press trip.

Budget

CalTour:	\$0
Editorial Visits	\$0
Press Trips.....	\$0
Private Sector Support	In-kind contributions

CALIFORNIA DIVISION OF tOURISM
1994/95 Marketing Budget

Research	\$219,300
Collateral and Fulfillment	\$960,000
In-state Marketing	\$402,000
Domestic Marketing	\$3,024,000
International Marketing	\$1,213,000
Media Relations ⁵	---
Reserve	\$104,000
Subtotal of Marketing Programs	\$5,922,300
 Operating Budget	 \$1,603,200
 TOTAL CALTOUR BUDGET	 \$7,525,500

⁵ Program descriptions and budget details for Media Relations are located within the Domestic Marketing and International Marketing sections of the Marketing Plan.

Glossary of Terms and Acronyms

ABA - American Bus Association, comprised of bus companies, operators and owners.

AVHRM - Association of Vacation Home Rental Managers

Business Travel - Travel for commercial, governmental or educational purposes with leisure as a secondary motivation.

Buyer - a member of the travel trade who reserves room blocks from accommodations or coordinates the development of travel product.

Blocked - hotel rooms held without deposit.

Booked - hotel rooms, airline tickets or other travel services held for a specific client.

Carrier - any provider of mass transportation, usually used in reference to an airline.

California Conference on Tourism - an annual statewide tourism conference, jointly sponsored by CalTour and CalTIA.

California Tourism Marketing Act - The law which articulates the purpose of and authorization for California's travel industry to conduct industry self-assessment in order to fund statewide tourism marketing.

California Tourism Policy Act of 1984 - The law which articulates the purpose of and authority for, tourism marketing within California.

CABBI - California Association of Bed and Breakfast Innkeepers.

CALFEST - California Association of Fairs and Festivals.

CalTIA - The California Travel Industry Association, an industry association which represents all segments of California's travel industry.

CBA - California Bus Association.

CofCs - Chambers of Commerce specialize in local economic development and can include tourism promotion.

Charter Group - Group travel in which a previously organized group travels together, usually on a customize itinerary.

CH&MA - California Hotel & Motel Association.

CLIA - California Lodging Industry Association.

C&VB - Convention and visitors bureaus are local tourism marketing organizations which specialize in developing conventions, meetings, conferences and visitation to a city, county or region.

Cooperative Partner - an independent firm or organization which works with CalTour by providing cash or in-kind contribution to expand the marketing impact of the CalTour program.

Cover - each diner at a restaurant.

CTC - California Tourism Commission.

CTRLA - Car and Truck Rental and Leasing Association.

Destination - a hotel, resort, attraction, city, region or state.

Destination Marketing Organization - DMOs are local tourism marketing organizations, such as convention and visitors bureaus or chambers of commerce.

DMO - Destination Marketing Organization.

Domestic Program - Marketing done to promote travel by Californians within California. Both rural and urban regions of California benefit.

CalTour - California Division of Tourism, formerly the California Office of Tourism.

CalTour - California Division of Tourism, formerly the California Office of Tourism.

Fam Tours - organized trips for travel agents, tour operators, tour wholesalers or other members of the travel trade for the purpose of educating and "familiarizing" them with tourism destinations. By seeing the destinations that they are sending travelers, the travel trade is better prepared to answer customer questions and promote travel to the location. Also called "fams" or "familiarization tours."

Feeder Airport/City - An outlying city which feeds travelers to hubs or gateway cities.

FIT (Free Independent Travel) - Individual travel in which a tour operator has previously arranged blocks of rooms at various destinations in advance for use by individual travelers. These visitors travel independently, not in a group, usually by rental car or public transportation.

Frequency - the number of times an advertisement appears during a given campaign.

Gateway or Gateway City - A major airport, seaport, rail or bus center through which tourists and travelers enter from outside the region. San Francisco is a gateway, because of its international airport, seaport and ground services.

GIT (Group Independent Travel) - Group travel in which individuals purchase a group package in which they will travel with others along a pre-set itinerary.

Hub - An airport or city which serves as a central connecting point for aircraft, trains or buses from outlying feeder airports or cities.

Icon - A facility or landmark which is visually synonymous with a destination. California's most famous tourism icons include: the Golden Gate Bridge, the Hollywood sign, Yosemite's Half Dome, Yosemite Falls, palm trees, Venice beach, redwood trees and cable cars.

International Program - Marketing done to promote travel to California by residents of other countries. Both rural and urban regions of California benefit.

Leisure Travel - Travel for recreational, educational, sightseeing, relaxation and other experiential purposes.

Market Share - The percentage of business within a market category. For example, California held an 11.3% share of U. S. leisure travel in 1991. This means that of all Americans participating in leisure travel in that year, 11.3% did so in California.

Market Volume - The total number of travelers within a market category. For example, 194.6 million person leisure trip visits occurred in California in 1991.

NTA - National Tour Association, comprised of domestic tour operators.

Person Trip Visit - Every time a person travels more than 100 miles (round-trip) in a day or stays overnight away from his/her primary domicile, whether for business or leisure purposes, he/she makes one "person trip visit." A family of four which travels from Sacramento to Lake Tahoe and back in a day would make four person trip visits. There were 259 million person trip visits in California in 1991.

Pow Wow - the largest international travel marketplace held in the United States, sponsored by TIA and USTTA.

Press Trips - organized trips for travel writers and broadcasters for the purpose of assisting them in developing stories about tourism destinations. Often, journalists travel independently, though with the assistance of CalTour and DMOs.

Press/Publicity Release - a news article or feature story written by the subject of the story for delivery and potential placement in the media.

Property - a hotel, motel, inn, lodge or other accommodation facility.

Reach - the percentage of people within a specific target audience reached by an advertising campaign.

Retail Agent - a travel agent.

Room Blocks - Several rooms held for a group.

Rural Region - California has been divided into twelve tourism regions, eight of which are defined as rural regions. They include: North Coast, Shasta Cascade, High Sierra, Central Valley, Gold Country, Deserts, Central Coast and the Inland Empire.

Sales Missions - Where California suppliers travel together to another state or country for the purpose of collectively promoting travel to California. Sales missions may include educational seminars for travel agents and tour operators.

Sales Seminar - an educational session in which travel agents, tour operators, tour wholesalers or other members of the travel trade congregate to receive briefings about tourism destinations.

Target Audience/Market - a specific demographic, sociographic or geographic target at which marketing communications are directed.

Target Rating Points - TRPs are a statistical measurement which allows one to evaluate the relative impact of differing advertising campaigns.

TIA - Travel Industry Association of America. The national counterpart to CalTIA.

TCA - California Trade and Commerce Agency, formerly the California Department of Commerce.

TOT - Transient Occupancy Tax.

Tourism - Leisure travel.

Tourist/Visitor/Traveler - Any person who travels whether for leisure or business purposes more than 100 miles (round-trip) in a day or who stays overnight away from his/her primary domicile.

Tour Operator - an individual or company that organizes and conducts packaged tours.

Tour Wholesaler - an individual or company that sells tour packages and tour product to travel agents. Tour wholesalers usually receive a 20% discount from accommodations, transportation companies and attractions and pass on a 10 to 15% discount to the retail agent.

Transient Occupancy Tax - TOT or bed tax is a locally set tax on the cost of commercial accommodations and campgrounds.

Travel Agent - an individual who arranges travel for individuals or groups. Travel agents may be generalists or specialists (cruises, adventure travel, conventions and meetings). Travel agents receive a 10 to 15% commission from accommodations, transportation companies and attractions for coordinating the booking of travel. They typically coordinate travel for their customers at the same or lower cost than if the customer booked the travel on his/her own.

Travel - Leisure and other travel including travel for business, medical care, bereavement, education, etc. All tourism is travel, but not all travel is tourism.

Travel Product - published tour and travel packages.

USTTA - United States Travel and Tourism Administration, the U.S. Department of Commerce's travel and tourism promotional agency. Its function is to promote travel to the U.S. from other countries.

WACVB - Western Association of Convention and Visitors Bureaus.